



Procure Plus

Tender Management Marker User Manual Version 1.2

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1. System Requirements

The Tender Management System can be accessed by any computer with the following:

- A Windows or Apple Mac PC
- Working Internet Connection
- An internet web browser such as Internet Explorer or Mozilla Firefox

In addition it is preferable to have a broadband connection as this will ensure pages are downloaded more quickly, allowing you to interact with the system much more smoothly.

2. System Overview

The system is a Tender Management system, delivered through the internet, to allow interested bidders to use the system to answer appropriate qualification questions and then allow “markers” to score their responses in a standardised way.

3. Accessing the System

3.1 Logging In

The system is provided through your website browser and can be accessed from any suitable computer with an Internet connection (see 1. System Requirements).

To access the system you will need a username and password given to you by Procure Plus. To login type the following website URL into your browser's address bar and press enter.

<http://tendermanagement.procure-plus.com/>

Once you have arrived at the login page (Figure 1 - Login Page) it is a good idea to bookmark the page so you can easily access it in the future.

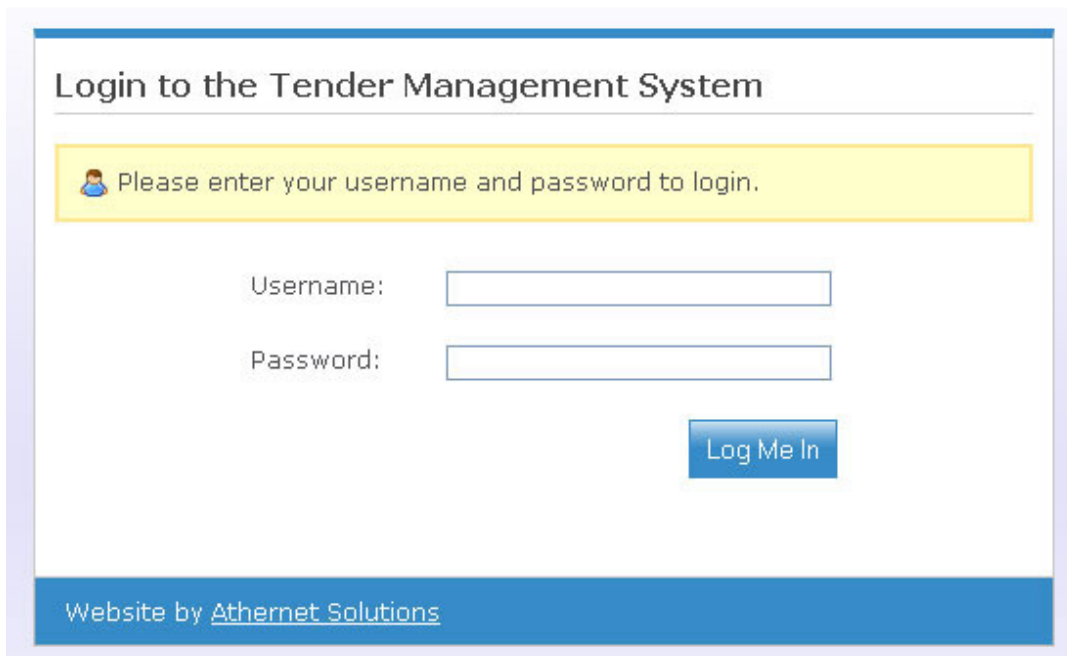


Figure 1 - Login Page

Enter your Username and Password and click the “Log Me In” button, if any errors occur they will be displayed on screen. If the login attempt was successful you will be redirected to the system's Dashboard.

3.2 The Dashboard

Once logged into the system you will be presented with the Dashboard Page (Figure 2 - Dashboard Page).

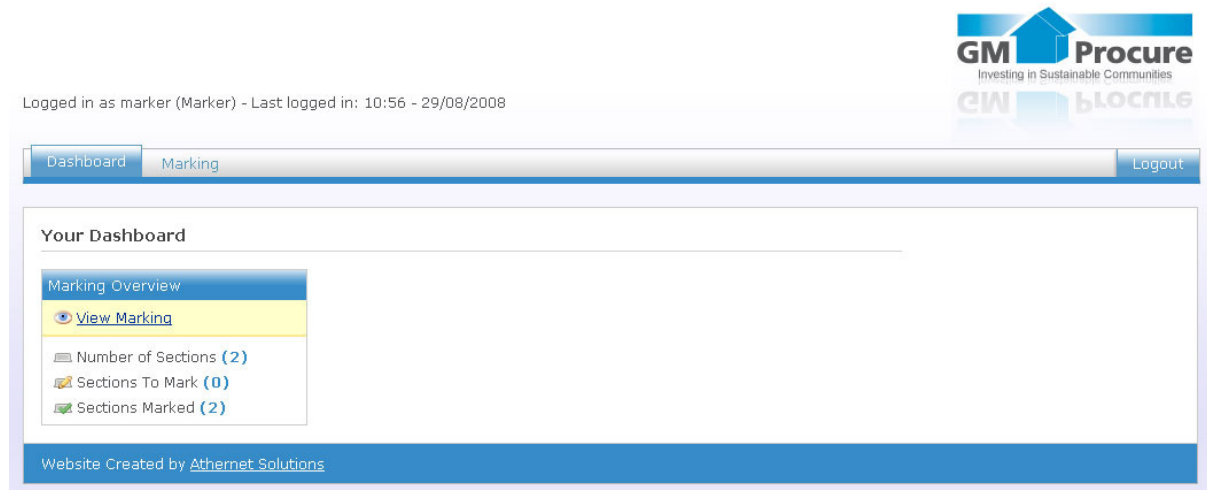


Figure 2 - Dashboard Page

Take a moment to familiarise yourself with the system layout. At the top of the page there is a horizontal navigation bar containing links to the various sections of the system.

Above the navigation there is some general information regarding who you are and the last time you logged in.

The Dashboard is the first page that you will see when you have logged in and will display an overview of the Marking Sections in the system.

3.3 Logging Out

To logout of the system you can click the “Logout” button located in the main navigation menu running across the top of the screen.

If you need to access the system after you have logged out you will need to enter your Username and Password again at the Login page.

The system can cope with long periods of inactivity so you are free to leave whilst being logged in but please be aware of security concerns of leaving your computer.

4. General System Concepts

In order to be as uniform as possible the system will adhere to a number of simple concepts that will run across all aspects of the system.

This has been designed to reduce the learning curve of the system and to ensure that the system conforms to a single standard.

4.1 Headings

Headings in the system can be identified by a larger than normal, bold text with a single line that runs underneath the heading across the entire screen.

4.2 Links

All links in the system (excluding the navigation) are underlined in a normal state and when you hover over a link the underline will not be displayed.

Other links that denote a major action such as “Summary” or “Edit” are styled with a blue box with white underlined text (Figure 3 - Action Links).



Figure 3 - Action Links

If the page you are viewing contains lots of items then the system will only display a limited number of these and will provide extra links at the bottom of the page to navigate through the remaining items. This is called “pagination” with the system displaying a number of pages and a “next” and “prev” links (Figure 4 - Pagination Links) to display the next set of items.



Figure 4 - Pagination Links

4.3 Icons

Icons (small images depicting an action) are used throughout the system to convey meaning and to increase overall aesthetics.

Actions such as “Add” and “Delete” are always accompanied by an icon to reinforce the way the system has been developed.

Tenders make use of icons to quickly identify which are in an assessment / closed / completed / draft / live state (Figure 5 - Icons).



Figure 5 - Icons

4.4 Search & Filters

The system utilises search and filter functionality (Figure 6 - Search & Filters) on pages that allow you to add, edit and delete items such as Tenders and Companies.

Name	Status	Closing Date	Created	Actions
<input type="text" value="Search Terms"/>	<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="button" value="Filter"/> <input type="button" value="Reset"/>

Figure 6 - Search & Filters

The search box is generally used to search for the name of the item and will return any matches that the system finds. The search will be as general or as specific as you require so if you are looking for single item it is best to type in the full name of the item. On the other hand if you do not know the full name of the item then a general search term will return a number of results.

The filter items will appear as drop-down options across the top of the screen and will usually contain either a list of names or a number of ranges to select from. You can also combine multiple filters to narrow down your results even further if you so desire.

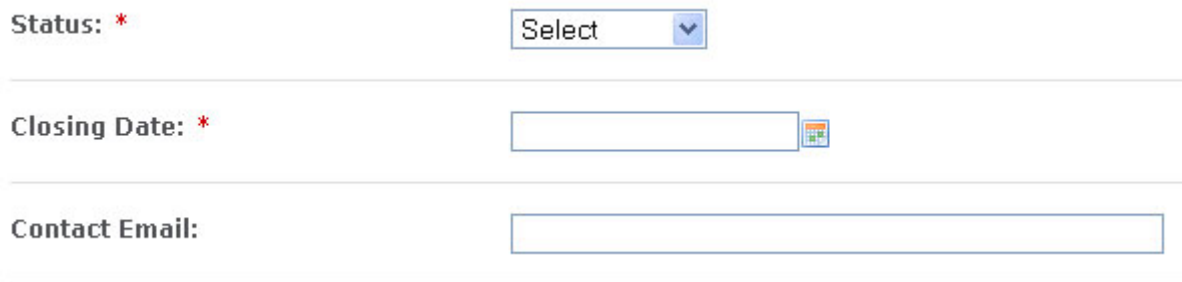
In order to activate the search and/or filter you must click the filter button located at the right side of the screen. Once your filter has been processed any results that have been found will be displayed onscreen. Your filter options will be automatically re-selected after you click the filter button and your results can be saved permanently by book-marking the page in your browser.

To reset any searches or filters you have entered simply click the “reset” button to revert back to the default page.

4.5 Forms

For consistency the system has a standard layout for all forms, generally each form field is separated by a grey line unless the inputs are closely related.

Required fields (fields that must contain information before the form data is saved) are displayed with a red asterisk (Figure 7 - Required Fields) and fields that are optional are not accompanied by an asterisk.



The screenshot shows a form with three fields. The first field is labeled 'Status: *' and has a dropdown menu with 'Select' and a downward arrow. The second field is labeled 'Closing Date: *' and has a text input box with a small calendar icon to its right. The third field is labeled 'Contact Email:' and has a text input box. Each field is separated by a horizontal grey line.

Figure 7 - Required Fields

If you have tried to submit a form and it contains errors or a required field has been left blank then the form will be re-displayed. The errors will be listed at the top of the page (Figure 8 - Errors List) in a red box detailing what exactly went wrong. Along with a list of errors the form field in question will also be highlighted in red (Figure 9 - Highlighted Error Field) so that you can quickly see the field that needs your attention.



The screenshot shows a red-bordered box with a light red background. It contains the following text:
You have the following errors
The Name field is required.
The Status field is required.
The Closing Date field is required.
If you selected any files for upload these will need to be re-selected.

Figure 8 - Errors List



The screenshot shows a form field labeled 'Name: *' with a text input box. The entire field is highlighted with a light red background, indicating an error.

Figure 9 - Highlighted Error Field

If the form input is a date then the valid format used by the system is dd/mm/yyyy. A small calendar icon will appear next to the field and once clicked it will display a small calendar which you can use to select your date (Figure 10 - Calendar).

The calendar will also be displayed when you click inside the form field to enter a date; this is a usability feature and allows you to quickly see the calendar.

When first selecting a date the current month will be displayed with the current day highlighted. At the top of the calendar you will be able to cycle through the months by clicking on the "<" and ">" links

and also cycle through the years by clicking the “<<” and “>>” links. If a date has already been selected the day will be highlighted in red with the current date highlighted in a darker grey.



May 2008						
M	T	W	T	F	S	S
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

Figure 10 - Calendar

All forms throughout the system have 3 buttons located at the very bottom of the form (Figure 11 - Form Buttons). The “Save” button will attempt to save the form data and then return back to the same page. If the page contains an add form then the form will be empties ready to add another item. If the page contains an edit form the page will be refreshed with the submitted values.

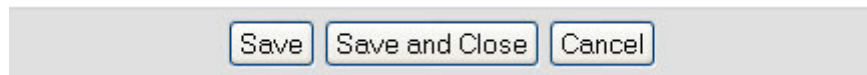
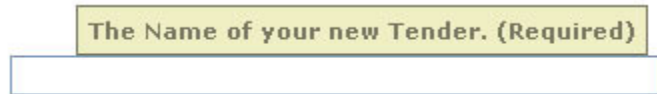


Figure 11 - Form Buttons

4.6 Tooltips

The system utilises tooltips (Figure 12 - Tooltips) on pages that ask for user input such as forms and filters. A small box will appear when you hover your mouse giving you more information about the input field and whether it is a required piece of information. The tooltip will disappear when you move your mouse away from the field.

Name: *



The Name of your new Tender. (Required)

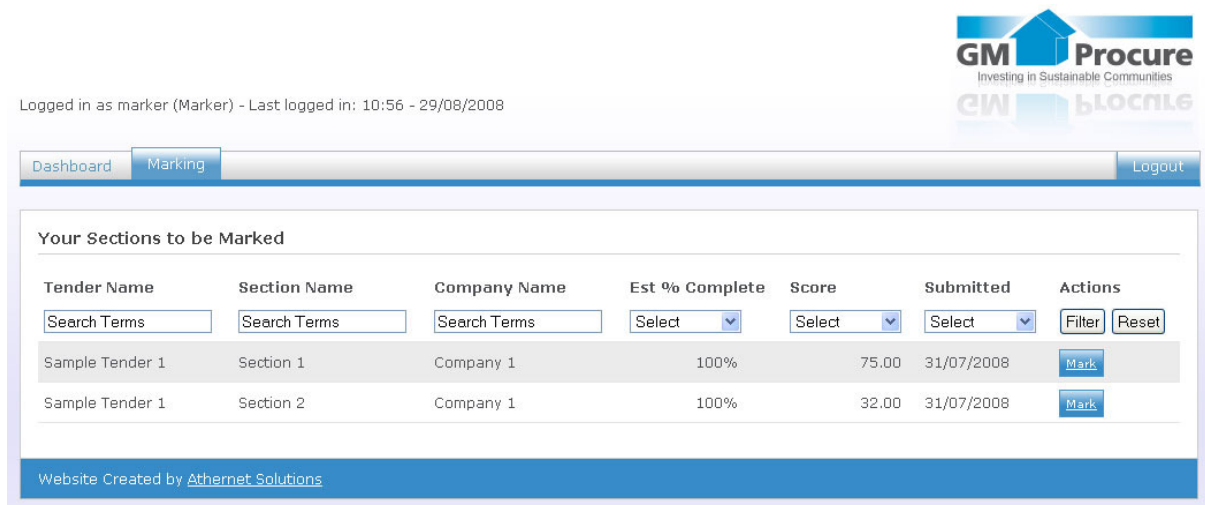
Figure 12 - Tooltips

5. Marking

The Marking page can be accessed from the main navigation menu running across the top of the screen.

5.1 Main Marking Page

The main page lists all the Sections that need to be Marked by you in the system (Figure 13 - Main Marking Page) in alphabetical order (by Tender Name then by Company Name), if the system contains more than 10 items then a number of extra pagination links will be visible at the bottom of the page (see 4.2 for more information) to cycle through all the available Bids.



Logged in as marker (Marker) - Last logged in: 10:56 - 29/08/2008

GM Procure
Investing in Sustainable Communities

Dashboard Marking Logout

Your Sections to be Marked

Tender Name	Section Name	Company Name	Est % Complete	Score	Submitted	Actions
<input type="text" value="Search Terms"/>	<input type="text" value="Search Terms"/>	<input type="text" value="Search Terms"/>	Select	Select	Select	Filter Reset
Sample Tender 1	Section 1	Company 1	100%	75.00	31/07/2008	Mark
Sample Tender 1	Section 2	Company 1	100%	32.00	31/07/2008	Mark

Website Created by [Athenet Solutions](#)

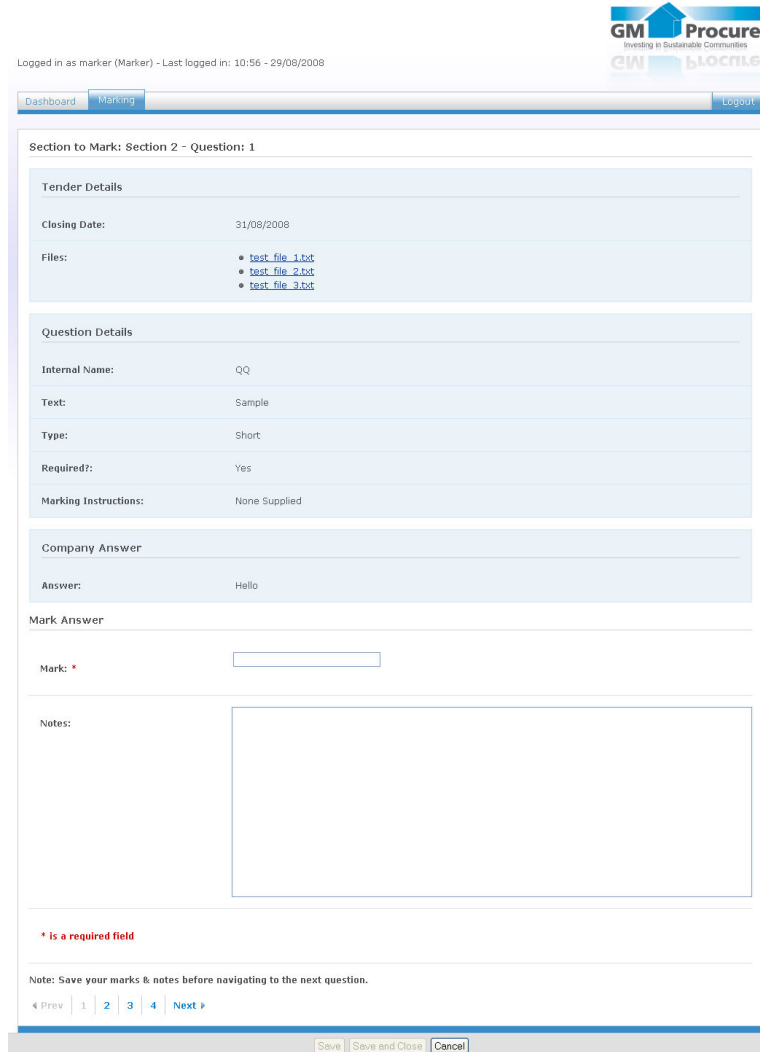
Figure 13 - Main Marking Page

From the main page you can apply search & filters to your Sections and are able to Mark and delete the Sections by clicking the links under the “Actions” column.

5.2 Mark Page

The Mark page (Figure 14 - Mark Page) displays the Tender Section one Question at a time with every single aspect of the Tender, Bidder, Question and Answer. On each page you must mark each Question by entering a Mark and an optional Note.

Once you have saved your Mark & Note you can then proceed to the next Question by using the pagination links at the bottom of the page.



Logged in as marker (Marker) - Last logged in: 10:56 - 29/08/2008

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Dashboard Marking Logout

Section to Mark: Section 2 - Question: 1

Tender Details

Closing Date: 31/08/2008

Files:

- [test_file_1.txt](#)
- [test_file_2.txt](#)
- [test_file_3.txt](#)

Question Details

Internal Name: QQ

Text: Sample

Type: Short

Required?: Yes

Marking Instructions: None Supplied

Company Answer

Answer: Hello

Mark Answer

Mark: *

Notes:

* is a required field

Note: Save your marks & notes before navigating to the next question.

◀ Prev 1 2 3 4 Next ▶

Save Save and Close Cancel

Figure 14 - Mark Page

Once you have marked all the Questions in the Section you are then able to submit the Marks. Once this has been done you can no longer change the Marks from this Page, this can only be done from the Bids Page.

5.3 Delete Marks

To delete Section Marks you need to click the bin icon on the Main Marking Page, this will bring up a dialogue box asking you to delete the Section Marks. If you click "OK" to this box the Section Marks will be deleted from the system. If you choose "Cancel" the delete action will not continue and you will be sent back to the Main Marking Page.

Please make sure you are certain you want to delete the Section Marks before continuing with the delete action.